

***Talk to a
Site Selector***

Governor's Conference on Economic
and Community Development

Nashville, Tennessee

September 13, 2006

Introduction of Strategic Development Group

Mark Williams, President

Strategic Planning and
Marketing for Economic
Development
Organizations



Introduction of Strategic Development Group

Mark Williams, President

Site Search
and
Negotiation
for Large
Corporations



Photo Courtesy of BAPM

Clients Include:

- Bridgestone
- BMW
- ASMO/DENSO
- Safe Auto
- Tupperware
- Commercial Metals Corporation
- Firestone
- BP
- Eastman Chemical Company

Recent Project Announcements

- Bridgestone Aircraft Tire
- Koyo Corporation / Nakatetsu

Key Questions for this Session

- How are sites evaluated for potential investment?
- What standards are used in the evaluation?
- How does a community make the 'short list'?



Key Elements of the Site Location Process

Top 10 Site Selection Factors

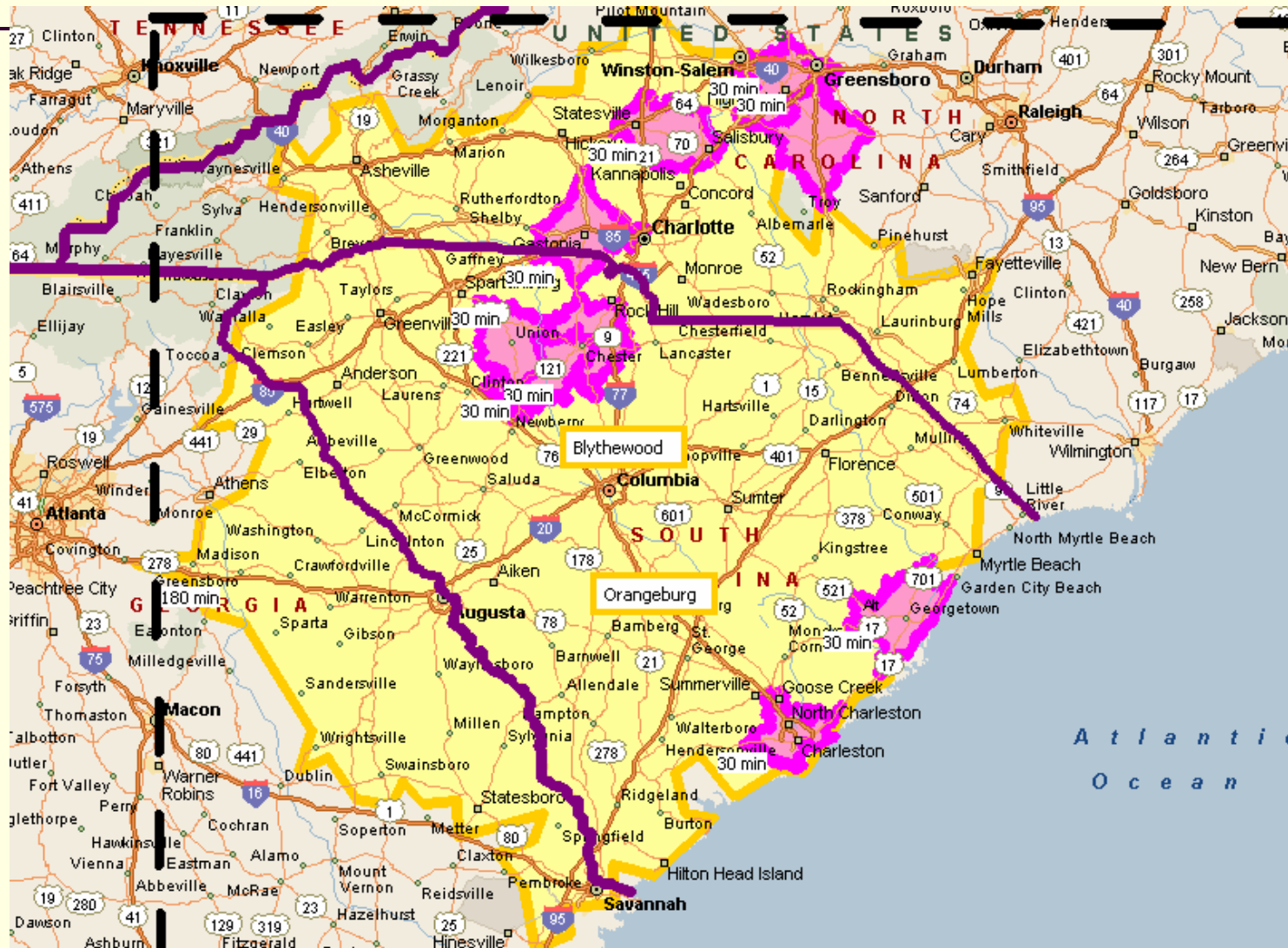
Ranking	Factor	2005	2004
1	Highway Accessibility	91.4	90.2
2	Labor Costs	87.9	96.4
3	Availability of Skilled Labor	87.2	89.1
4	State and Local Incentives	86.0	87.5
5	Availability of High-Speed Internet Access	85.7	80.7
6	Corporate Tax Rate	85.0	84.4
7	Occupancy or Construction Costs	83.7	83.6
8	Tax Exemptions	83.6	83.3
9	Proximity to Major Markets	83.2	N/A
10	Energy Availability and Costs	82.8	85.8

Quality of Life Factors

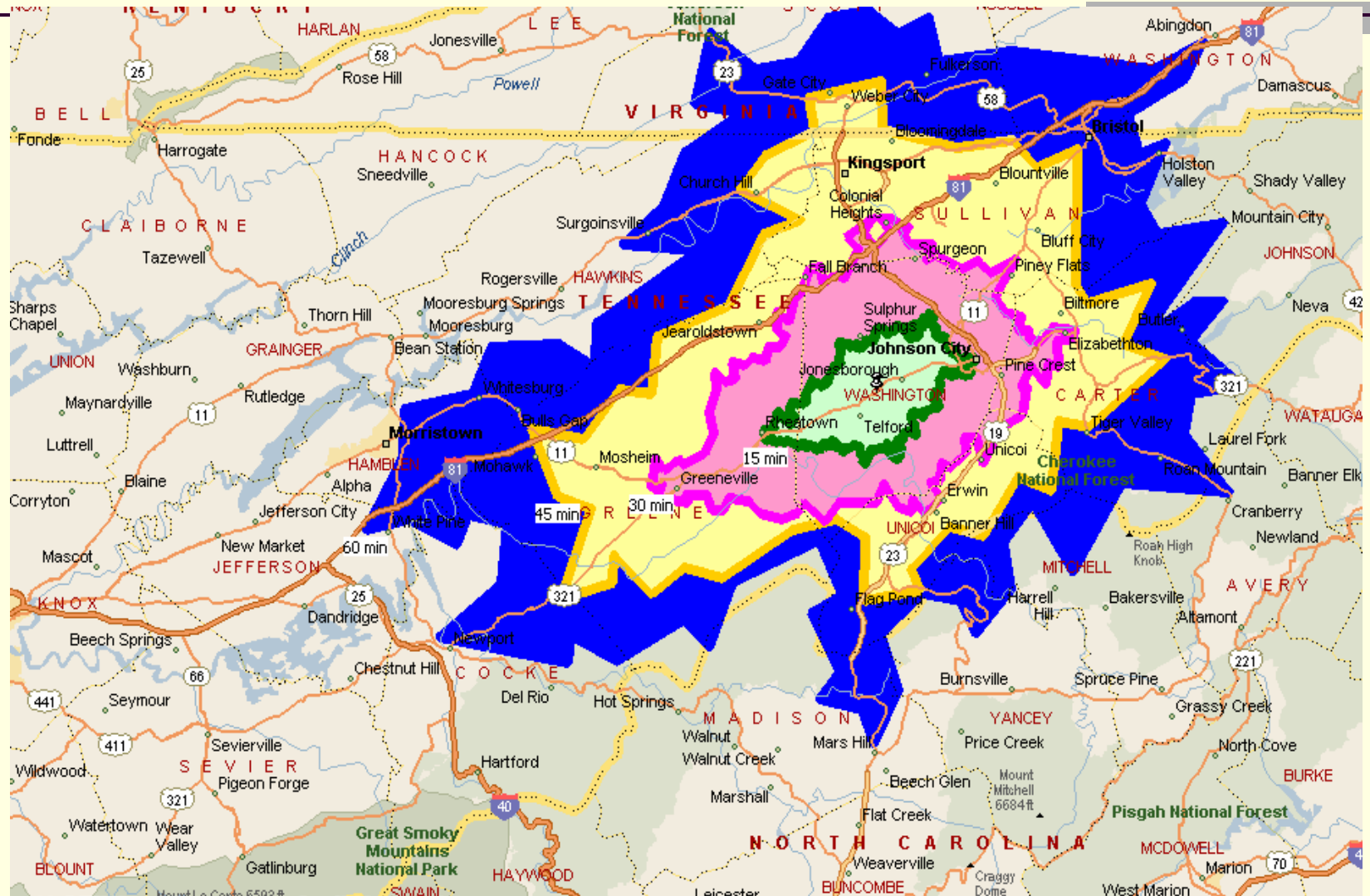
Ranking	Factor	2005	2004
1	Low Crime Rate	67.8	80.2
2	Health Facilities	62.1	72.2
3	Housing Costs	60.0	64.5
4	Housing Availability	59.3	65.8
5	Ratings of Public Schools	56.8	66.7
6	Cultural Opportunities	48.8	51.9
7	Climate	46.5	50.5
8	Colleges and Universities in area	46.0	58.1
9	Recreational Opportunities	44.8	50.5

Source: Area Development - 2005

Map of Initial Search Area



Washington County Drive Times



Location Comparisons

		Location A	Location B	Location C	Location D
	Columbia	264 miles	74 miles	42 miles	134 miles
	Orangeburg	301 miles	127 miles	79 miles	179 miles
	Charlotte	245 miles	179 miles	131 miles	42 miles
	Miles to nearest Port	350 miles to Charleston	200 miles to Charleston	151 miles to Charleston	247 miles to Charleston
	Miles to Airport	Mc Ghee Tyson Airport (12 miles)	Greenville / Spartanburg (1 hour)	Columbia (42 miles)	Charlotte (42 miles)
	Miles to Interstate	Located I-75 & I-40	4 lane highway to I-85 (43 miles)	Located on I-26	Located on I-85 & I-40
			I-26 (21 miles)	42 miles to Interstate 20	I-77 (15 miles)
	Major Employers	Clayton Homes	Fuji Film - Photo Equip	Louis Rich	Freightliner - Large Truck (3,600 employee)
		Brunswick Corporation	Pfizer / Capsugel - Gelatin Capsule	Renfro FL	KoSa - Yarn Spinning (1,300 employee)
		Pilot Corporation	Velux - Roof Window / Sky Light	American Fiber and Finishing	Draftex - Rubber Goods
		Covnent Health	Greenwood Foundry - Iron Castings	Georgia Pacific	Oakwood Homes - Mobile Home Mfg
		Goody's Family Clothing	Eaton - Hydraulics and Electrical	Shakespeare Electronics and Fiberglass	Various textile company
	International Company	Yes	Yes	Yes	Yes

Location Comparisons

		Location A	Location B	Location C	Location D
Workforce	Labor Force	33,076	208,670	55,000	105,733
	Unemployment Rate	4.9%	4.1%	6.6% (2004)	10.8%
	% employed in Manufacturing	15.00%	11.00%	18%	15.90%
	Union Activity	TBD	TBD	No Activity / No union Facility	Yes Freightliner (UAW)
	Avg Manufacturing Wage Rate	\$18.17	\$19.00	Entry (\$9.49); Average (\$12.63)	Entry (\$9.84); Average (\$15.15)
	Per Capita Income	\$21,326	\$25,369	(2005) \$20,609	(2003) \$19,177
	Median Family Income	\$38,794	\$53,750	(2005) \$53,993	(2003) \$40,591
	Avg Age	39.2	38	38.5 years	37.3 years
	Population Race Distribution	80% White, 16.3% Black	88.3% White, 8.9% Black	71.6% White, 26.3% Blackc	80.0% White, 15.8% Black
Education	College / University	University of Tennessee (Knoxville)	University of Tennessee	University of South Carolina	Wake Forest (Winston Salem)
	Technical College	Tennessee Tech Center (Knoxville)	Tennessee Tech Center	Very Small must use Columbia	Rowan / Cabarrus Community College
	Workforce Education	21.1% No Diploma	11.5% No Diploma	25% no Diploma	26% No Diploma
		58.1% High School Graduate	57.3% High School Graduate	53% High School Graduate	60% High School Graduate
		20.8% College Graduate	31.2% College Graduate	22% College Graduate	14% College Graduate



Other Factors

- Be Prepared to Address all Key Needs
 - Timing
 - Location of Competitors
 - Location of Affiliate Plants
 - Look and feel of the property
 - The “neighborhood”
 - Various other:
 - Distance to Family
 - Skiing
 - The Wine List

STRATEGIC DEVELOPMENT GROUP, INC.

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Strategic Development Group, Inc. is a privately owned professional consulting firm offering expert site location, negotiation and economic development services. The firm's client base consists of large multinational and US-based

Courtesy of Foster, Saad & Co.



Strategic Development Group, Inc.
headquarters located in Columbia, SC

companies as well as state, regional and local economic development organizations. This base of private sector / government clients provides synergistic benefits to each client group. The firm's headquarters is located in Columbia, South

Carolina and conducts business throughout the United States.

Strategic Development Group operates under principles of ethical practice while delivering expert advice that creates profound value for its clients in a timely and cost effective manner.

Clients We've Helped...



BMW Manufacturing Corp.

"During my tenure as Governor, I worked on numerous corporate location projects with Strategic Development Group's President, Mark Williams. These projects resulted in over \$3 billion investment from US and foreign corporations.

In my view Mr. Williams is one of the nation's foremost site location and economic development experts. He understands the complexities of working with the public and private sector and consistently creates significant value for his clients while operating the